

The influence you own

Building owned attention in the age of AI

Twenty years of brand partnerships taught me one thing:

You cannot rent a relationship. You have to build it.

ACT 2



Where do you watch your favorite content?

96% of Gen Z watch it on the toilet.

Sources: BankMyCell, 2018 online survey (2,114 US respondents; “Gen Z” = under 23): 96% do not go to the bathroom without a phone · QS Supplies, 2025 (500 US + 500 UK): 92%. These data measure phone use in the bathroom, not what users watch.

20 million

every day

videos uploaded to YouTube, on average

Source: YouTube for Press (blog.youtube/press), accessed 22 October 2026. Figure reported by YouTube; not independently verified.

ACT 2



4.8m

YouTube channels with 10,000+ subscribers (out of 61m)

391,000

active podcasts worldwide (out of 3.7m ever launched)

336

standalone streaming services in the US

2,170+

FAST channels worldwide tracked by Gracenote

9,639

linear TV channels in Europe

FEUDAL MEDIA By ALAN WOLK

Sources: vidIQ (Jul 2026) · Listen Notes via Inside Radio (Mar 2026) · Parks Associates (Sep 2026, US only) · Gracenote Data Hub (Jul 2026; tracked channels) · EAO/MAVISE (Dec 2025, Europe, including local channels)

ACT 3

INDIFFERENCE

75% · 84%

sellers: declining returns (Taboola) — buyers: indifference (Havas)

Sources: Taboola/Qualtrics, April 2025 (300+ US advertisers) · Havas, The Science of Desire, June 2026 (87,551 respondents, 2,411 brands, 10 markets)

ACT 3

PERFORMANCE

67%

of US digital ad revenue sold on performance: clicks, leads, sales (2020, latest published figure)

ACT 4

RELATIONSHIP IS INFLUENCE. INFLUENCE IS MONEY.



-78%

Nike market cap from its 2021 peak to today



59%

of 2025 operating income from Experiences and Consumer Licensing: $10.4bn out of $17.6bn

Performance marketing accelerates conversion but does not build what generates it.

ACT 4



THE CREATOR ECONOMY HAS DEMOCRATIZED ACCESS TO RELATIONSHIPS.

Media have always done this: they build audiences through programming, then monetize the IP. Today a brand can do the same.

ACT 4



HOW TO BUILD INFLUENCE

ACT 4

BY BECOMING AN IP

A creator is a person.
An IP is a system that survives the person.

ACT 4

First the relationship, then influence, then monetization

Duolingo

RELATIONSHIP

Native social language within pop culture; comments become the brief.

MONETIZATION

Around 80% of users arrive through word of mouth. Paid media amplifies what already works.

Sides

RELATIONSHIP

Six friends (originally seven) build belonging through a YouTube channel with over 22 million subscribers.

MONETIZATION

First merchandise (2014), then Sides and other brands. Revenue is not public.

WeRoad

RELATIONSHIP

A cultural territory: traveling in groups with people you have never met.

MONETIZATION

Fabio will tell us more shortly.

Sources: AdExchanger, Duolingo VP Marketing (2 Aug 2023, self-reported signup survey); Wikipedia and Tubefilter (2 Sep 2022) for Sidemen. Company-reported figures, not independently verified.

duolingo

The owl is the new IP

ACT 4

Duolingo: the story and the numbers

The story

2012 public app launch
2019 $1.5bn valuation
2021 IPO. TikTok: from 50,000 to 16m followers in four years
~2022 starts selling Duo merchandise

2025 first year above $1bn revenue

$251m → $1,030m

revenue 2021 → 2025, first year above $1bn

≈12%

marketing as a share of revenue, stable: 12.1% in 2024, ≈12.2% in 2025

Does the channel sell?

Not directly: it brings users to the app. Advertising represents 7.7% of revenue. Merchandise exists, but Duolingo calls it “secondary” to brand awareness.

Sources: Duolingo 2025 Form 10-K and Q3 2025 shareholder letter; Inc. (2025 revenue); The Drum, 25 Feb 2025; Modern Retail, 22 Aug 2024 (merchandise); Wikipedia (timeline). Marketing share = sales and marketing expense / revenue, author’s calculation.

ACT 4

CONTENT WITH A VIEW

SIDES

The Sidemen

become the IP

ACT 4

Sidemen: from channel to products

2013

the group of friends forms on YouTube

2014

Sidemen Clothing: merchandise

2021

Sides: virtual kitchens, then restaurants (from 2022)

2022

XIX Vodka and Side+, the paid fan club

2023

first physical store at Bluewater

22 mln+

subscribers to the main channel (2025)

£14,7 mln+

raised through the Charity Match since 2016

Sources: Wikipedia (timeline, Jun 2026), Tubefilter (2 Sep 2022), The Grocer (2026), City AM (25 Mar 2025), Social Blade (May 2025).

CONTENT WITH A VIEW

WEROAD

The brand becomes democratic and turns into an IP

ACT 4

WeRoad: from community to Airbnb equity

€130 mln

2025 revenue, +30% year on year (company-reported). In 2022 the target was €30m

300.000+

people have traveled since launch, around 110,000 in 2025

4.000+

coordinators: the community that creates the product

58M

Airbnb equity

Social followers grew from about 1.5m (2022) to around 3.5m (2026).

Valuation undisclosed. Growth, yes; profit, not yet: 2024 net loss of €6.1m (financial statements).

Sources: Quality Travel (company-reported 2025 revenue); Maddyness, 13 Oct 2022; Teleborsa and QuiFinanza, 27 May 2026 (10.7% stake reported by press, not by release); Startmag (2024 financial statements).

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From IP launch to monetization: how long does it take?

Disney	1928 Mickey → 1929 third-party licensing (+1) → 1955 Disneyland (+27) → 1987 first Disney Store (+59)
McDonald's	1948 first restaurant → 1979 Happy Meal (+31) → 2026 McDonald's Media Network (+78)
Sidemen	2013 channel → 2014 own merchandise (+1) → 2021 Sides (+8)
Duolingo	2012 app and owl → ~2022 merchandise (+10) → 2025 revenue over $1bn (+13)
WeRoad	2018 launch → 2022 €30m revenue (+4) → 2025 €130m (+7) → 2026 Airbnb (+8)

Sources: D23 (Disney licensing from 1929; first Disney Store 28 Mar 1987); EBSCO (McDonald's); exchange4media, 25 Sep 2026 (McDonald's Media Network); Wikipedia (Sidemen); Modern Retail, 22 Aug 2024; Duolingo 10-K; Quality Travel. Years in parentheses from launch.

ACT 4



BUT HOW DO YOU DO IT?

ACT 4

#1

Control ≠ Agency

Agency: interpreting and telling the product's story within culture

ACT 4

#2
A democratic brand
≠
A perfect. Impeccable. Useless brand.



#3

Weirdo system

#4
Own formats and IPs that outlive the people who carry them

AND AI?

ACT 4



Listening, not pushing (with AI)

AI scales listening.
Humans hold the relationship.

An example: Unilever says it uses AI to read social signals across languages. For Dove x Crumbl, fan input helped select the flavors.

Source: Consumer Goods Technology, 3 Jul 2025 (Unilever statements). Tools, volumes and results not independently verified.

ACT 4

AI: less time, lower production costs

6 weeks → 7 days

Klarna image development cycle (2024); $10m in declared annual savings

1 month

rather than one year: Coca-Cola 2025 Christmas ad, according to the CMO. AI generated over 70,000 clips, then refined by artists

−30/50%

content production costs: target stated by Mondelez (Oct 2025)

less production time and cost = more owned content for the same budget.

Sources: Marketing Dive, 29 May 2024 (Klarna); The Decoder, 4 Nov 2025 (Coca-Cola CMO); Reuters via NACS, 27 Oct 2025 (Mondelez, tool developed with Accenture). No independently verified results.

ACT 4 · AI

#5

Follow the IP = monetize the relationship

Belonging > relationship > IP > brand > money

or

Brand > IP > media > money



CASE STUDY

WeRoad

Fireside chat — 35 minutes

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